



NEWS RELEASE

DEFENSE FINANCE AND ACCOUNTING SERVICE

1931 Jefferson Davis Highway, Crystal Mall 3
Arlington, Virginia 22240-5291

Press Release 01-11
January 22, 2001
For External Release

1099-R forms mailed by January 15, 2001

The 1099-R forms for tax year 2000 were mailed by January 15, 2001 to all Department of Defense military retirees and annuitants. All 1099-R forms were mailed to the home address on file with the Defense Finance and Accounting Service.

Former spouses who have pay due as a result of a court-ordered division of community property will also be receiving 1099-Rs.

The 1099-R form has three copies of the information on one page with the form information on the back of the recipient's copy. For example, box 1 (gross distribution) does not contain gross income, but is the total amount of annuity received - or the taxable amount - as shown in box 2a. For retirees, this amount does not include nontaxable income such as Survivor Benefit Plan (SBP) costs.

Because the 1099-R is also used to report other types of income, the boxes that do not apply to retired members and annuitants will be left blank or have not been included in the form. For example, boxes 2b and 9 will be blank, and boxes 3, 5, 6 and 8 have been removed from these forms. The remaining boxes correspond to IRS instructions for 1040 and 1040A forms.

Retirees in a non-pay status, such as those receiving a full VA waiver or a full Civil Service waiver will not receive a 1099-R.

REISSUE REQUESTS

Retirees or annuitants that do not get their 1099-Rs by January 31, 2001, have questions about their 1099-R forms or need to update their mailing address may contact:

- ◆ Air Force Financial Service Office
- ◆ Army Retiree Service Office
- ◆ Navy local pay offices in Personnel Support Activity (PSA) networks of Puget Sound (includes Hawaii), San Diego, CA, New London, CT and Jacksonville, FL (includes Pensacola).
- ◆ You may also contact DFAS-CL at 1-800-321-1080 Monday-Friday between the hours of 7 a.m. and 7:30 p.m. EST. To handle the number of calls received during this time of year, Saturday service will be available from 8:00 a.m. to 4:30 p.m. EST on February 3, February 10, February 17, and February 24, 2001.

When calling to request a reissue of your 2000 1099-R, press 1099 when prompted and your call will be forwarded to the next available Tax Customer Service Representative. Be prepared to provide your social security number, date of retirement if you are a recent retiree, and your current mailing address. DFAS-Cleveland will begin processing reissues on January 31, 2001. You can expect to receive the reissued 1099-R approximately seven working days after your initial request.

Written or faxed requests should be sent to one of the following:

- Retirees and former spouses:

: Defense Finance and Accounting Service - Cleveland Center

Code PRR
P.O. Box 99191
Cleveland, OH 44199-1126
Tele. 1-800-321-1080 or 216-522-5955 FAX 1-800-469-6559

•Annuitants:

Defense Finance and Accounting Service - Denver Center
DFAS-DE/PRRB
6760 E. Irvington Pl.
Denver, CO 80279-6000
Tele. 1-800-435-3396 or 216-522-5955 FAX 1-800-982-8459

CORRECTED 1099-Rs

To ensure our report of income and taxes matches the 1099-R you file with the Internal Revenue Service, requests for corrected 1099-Rs must be made in writing. The written request must include a complete explanation and justification as to why the 1099-R amounts are in error. Telephone, e-mail, and/or internet request for corrected 1099-Rs will **NOT** be honored. Listed below are addresses to send information to correct your 1099-R.

•Retirees and former spouses:

: Defense Finance and Accounting Service - Cleveland Center
Code PRR
P.O. Box 99191
Cleveland, OH 44199-1126

•Annuitants:

Defense Finance and Accounting Service - Denver Center
DFAS-DE/PRRB
6760 E. Irvington Pl.
Denver, CO 80279-6000

If you don't receive your 1099-R, or if it is incorrect, please alert DFAS in advance of the April 15, 2001. That way, you'll have your form before the tax-filing deadline.

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For more information, please contact Cathy Ferguson, 703-607-2716.